

EXHIBIT A
SAMPLE WORK STATEMENT
WORK AUTHORIZATION MR-00X

GLOSSARY

Specific terms and acronyms used throughout this work statement are defined as follows:

Acronym	Definition
	(Insert additional rows as needed.)

Problem Statement

Describe the problem that this research will address.

GOALS AND OBJECTIVES

The goal of this project is to...(Complete the sentence with a brief description of the goal(s). Goals can be technical, economic or social. Please be brief, two to three sentences maximum.)

This project meets the PIER Goal of <pick one from the list below> by <fill in the blank>. (If applicable, this project also meets the secondary goal of <pick one from the list below> by <fill in the blank>.)

PIER Goals

1. Improving the Energy Cost/Value of California's Electricity
2. Improving the Environmental and Public Health Costs/Risk of California's Electricity
3. Improving the Reliability/Quality of California's Electricity
4. Improving the Safety of California's Electricity

The objectives of this project are to...(Complete this sentence with the objectives, which are things that will be measurable or knowable at the end of **this** project.)

Examples of Performance Measures:

- . . .reduce the cost of electricity generation (or supply) by ____%.
- . . .increase the number of new technologies that are market-ready by ____<fill in the number>.
- . . . increase the adoption by the market of specific technologies by ____%.
- . . . increase the renewable technologies that are cost competitive by ____%.
- . . . increase the new energy systems that can use multiple fuels by ____%.
- . . . decrease end-use consumption in specific energy sectors.
- . . . decrease the system impacts over current best practices by ____%.
- . . .increase the number of market-ready technologies that contribute to reduced risks of increased environmental/health impacts by ____<fill in the number>.

- . . .reduce the interruption frequency and duration per customer type per year by ____<fill in the number>.
- . . .increase the expected number of new technologies providing increased reliability/quality choices to consumers by ____<fill in the number>.
- . . .decrease the rates of injury and fatality associated with electricity generation/supply and usage by ____<fill in the number>.
- . . .determine the effectiveness of the XYZ process.

ADMINISTRATION

MEETINGS

- Task 1.1 Attend Kick off Meeting
- Task 1.2 Critical Project Review Meetings **(Not Req'd for Exploratory Grants)**
- Task 1.3 Final Meeting
- Task 1.4 Progress Reports
- Task 1.5 Test Plans, Technical Reports and Interim Deliverables
- Task 1.6 Final Report
- Task 1.6.1 Final Report Outline
- Task 1.6.2 Final Report

PERMITS AND ELECTRONIC FILE FORMAT

- Task 1.7 Identify and Obtain Required Permits
- Task 1.8 Electronic File Format

Refer to Attachment A-1 for the details of Administration

TASK 2.0 TECHNICAL TASKS

The project's work scope involves the following technical tasks:

- Task 2.1 *(Insert Task Name)*
- Task 2.2 – 2.n-2 *(Insert Task Name)*
- Task 2.n-1 Technology Transfer Activities *(If applicable)*
- Task 2.n Production Readiness Plan *(If applicable)*

Technical Task Descriptions

The work effort should be divided into a series of logical, discrete and sequential tasks. Technical tasks start with the number **2.1**. Please use the following pattern for each technical task.

Task 2.1 *(Insert Task Name)*

The goal of this task is to . . . *(Complete the sentence by inserting a **brief** description that identifies the expected result(s) and accomplishments for this task. The description should be 2 to 3 sentences maximum. Use a consistent naming convention throughout the work statement. For example, the name “photovoltaic system” is not the same as the name “solar electric generation alternative.” Pick one name and stick with it throughout.)*

Successful completion of this task will be measured by...*(Complete the sentence by listing the performance measure(s) or other criteria that will be used to evaluate the results and to determine to what degree the goal was achieved.)*

Meeting this goal helps to achieve the project objectives by... *(Complete the sentence.)*

The Performing Institution shall:

- *(Insert verb in active tense) . . . (Complete the sentence.)*
- *(Insert verb in active tense) . . . (Complete the sentence.)*

*(List each individual **activity** with a separate bullet and begin each bullet with a verb to continue the sentence beginning with "The Performing Institution shall." Organize activities in the order in which they will occur. A bullet needs to appear before each activity. Use this section to describe the essential elements of **the process** you will use to complete the project..*

*The contents of each **deliverable** shall also be described in this section. Only the **names** of each deliverable shall appear in the "Deliverables" section. Use exactly the same name to identify a deliverable (report, data set, project plan, etc.) in the activity and in the list of deliverables. A bullet needs to appear before each deliverable.*

Deliverables are products that incorporate the knowledge and understanding gained by performing the activities and that are submitted to the Commission for review, comment and approval. Deliverables include, but are not limited to, written reports that describe methods, test plans, results of testing, analysis of data, conclusions, and recommendations for future study, workshop agendas and summaries, description and photographs of equipment/product developed, summaries of advisory group meetings, computer software with written instructions for data input and use of the software, if intended for public or Commission use, and production prototypes. The sum of the deliverables should be sufficiently detailed to be of use to stakeholders and other researchers. The level of detail should be sufficient for an observer to assess whether the project objectives and goals have been successfully met.

Deliverables:

- 1st deliverable (name only)
- 2nd deliverable (name only)

(List deliverables using the same name and in the order that they appear in "The Performing Institution shall" section. Only the deliverable name should be listed here. The contents of each deliverable shall be described in "The Performing Institution shall" section.)

Key Personnel:

<fill in the name(s)>

(Name of key person for this task that works for the Performing Institution. If none, state none.)

Key Subcontractors:

<fill in the name(s) and/or company(ies)>

(Name of key company or name of key person at key company for this task. If none, state none.)

Task 2.2 – 2.n-2

(Repeat the process as shown above)

Task 2.n-1 Technology Transfer Activities *(Technology Transfer activities for the Exploratory Grant program will be in the form of Progress Reports and Final Report).*

The goal of this task is to develop a plan to make the knowledge gained, experimental results and lessons learned available to decision-makers in industry and government.

If this task is applicable, the Performing Institution shall:

- Prepare a Technology Transfer Plan. The plan shall explain how the knowledge gained in this project will be made available to the public. The level of detail expected is least for research-related projects and highest for demonstration projects. Key elements from this report shall be included in the Final Report for this project.
- Submit the draft Technology Transfer Plan to the Commission Project Manager for review and comment. Once agreement on the draft plan has been reached, the final plan shall be submitted to the Commission Project Manager for written approval, which shall be provided within 5 working days of receipt.
- Conduct technology transfer activities in accordance with the Technology Transfer Plan. These activities shall be reported in the Monthly Progress Reports.

Deliverables:

- Draft Technology Transfer Plan
- Final Technology Transfer Plan

Key Personnel:

<fill in the name(s)>

(Name of key person for this task that works for the Performing Institution. If none, state none.)

Key Subcontractors:

<fill in the name(s) and/or company(ies)>

(Name of key company or name of key person at key company for this task. If none, state none.)

Task 2.n Production Readiness Plan *(If applicable)* (Not Req'd for Exploratory Grants)

The goal of the plan is to determine the steps that will lead to the mass manufacturing of the technologies developed in this project.

If this task is applicable, the Performing Institution shall:

- Prepare a Production Readiness Plan. The degree of detail in the Production Readiness Plan discussion should be proportional to the complexity of producing the proposed product and its state of development. The plan shall include as appropriate but not be limited to:
 - Identification of critical production processes, equipment, facilities, personnel resources, and support systems that will be needed to produce a commercially viable product;
 - Internal manufacturing facilities, as well as supplier technologies, capacity constraints imposed by the design under consideration, identification of design critical elements and the use of hazardous or non-recyclable materials. The product manufacturing effort may include “proof of production processes”;
 - A projected “should cost” for the product when in production;
 - The expected investment threshold to launch the commercial product;
 - An implementation plan to ramp up to full production.
- Submit the draft Production Readiness Plan to the Commission Project Manager for review and comment. Once agreement on the draft plan has been reached the final plan shall be submitted to the

Commission Project Manager for written approval, which shall be provided within 5 working days of receipt.

Deliverables:

- Draft Production Readiness Plan
- Final Production Readiness Plan

Key Personnel:

<fill in the name(s)>

(Name of key person for this task that works for the Performing Institution. If none, state none.)

Key Subcontractors:

<fill in the name(s) and/or company(ies)>

(Name of key company or name of key person at key company for this task. If none, state none.)